California Climate Investments 2024 Funding Guidelines

Draft Priority Populations Benefit Assessment Tool

Project Type: Jobs and Workforce Development

Purpose: The benefit assessment tool is used to determine if a project funded by California Climate Investments is located within and provides a benefit to a priority population.

Who uses it: Administering agencies, applicants, and/or funding recipients.

Background: Whenever possible, projects should have direct, meaningful, and assured benefits to residents of disadvantaged communities, low-income communities, and low-income households. These three groups are collectively called *priority populations*.

This tool must be used to determine if a project benefits a priority population. California Climate Investments recognizes a project as benefiting a priority population if it meets one option in each of the three steps of the benefit assessment tool.

There are different *benefit assessment tools* for different types of projects. For complex projects, there may be more than one that is a good fit. Email the *GGRF Program* for any questions related to this tool.

Project Type Description: Projects provide high-quality jobs or job training opportunities for workers. Projects could include supporting existing training programs that work to increase the number of technicians able to repair and maintain zero emissions vehicles or training programs that provide upskilling opportunities to get energy-related certifications. See the *Resource Portal* for more information on job quality principles. Project activities may be implemented as a standalone project or as part of a larger, more comprehensive project.

Steps to Determine if a Project Benefits a Priority Population

Select one option per step to answer the question: "Does this project benefit a priority population?" with a "yes" or "no." This tool does not capture all benefits a project may provide.

Step 1: Identify the Priority Population. The project must be located within a community identified as disadvantaged or low-income, or directly benefit residents of a low-income household;

Step 2: Identify a Need. The project must identify an important community or household need for the priority population identified in Step 1; and

Step 3: Provide a Benefit. The project must provide one of the direct, meaningful, and assured benefits listed in Step 3. The benefit must be to the priority population identified in Step 1 and must directly address the need identified in Step 2.

Step 1 – Identify the Priority Population

Instructions: Review the questions below and select one that is a "yes" for the project.

> **Note:** Project location can be defined as the job site, training location, residential address of the persons receiving the job or training or households designated as low-income receiving the job or training. When using the residential address or low-income household designation, at least 50% of job or training recipients must be from priority populations. When completing the tool prior to implementing the project, agencies must maintain documentation of targeted hiring efforts to ensure the project will be able to meet the 50% threshold. Agencies should select the priority population type that they are focusing their targeted hiring efforts on or the priority population with the highest percentage of trainees or workers.
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> Using residential address or low-income household designation is the preferred approach, however if the residential address or low-income household designation cannot be obtained, the project location can be the job site or training location.
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> **Resources:** Visit the *California Climate Investments Resource Portal* for the:
> • Priority Populations Map: a geographic tool to identify disadvantaged communities and low-income communities by address or census tract.
> • Low-income Household Designation Tool: a look-up tool to find low-income thresholds by county and household size.

☐ **A. Disadvantaged Community:** Is the project located in a disadvantaged community census tract or disadvantaged community Tribal land?

☐ **B. Low-income Community:** Is the project located in a low-income community census tract?

☐ **C. Disadvantaged Community ½ mile neighbor:** Is the project located outside of, but within a ½ mile of, a disadvantaged community and also in one of the following:
  o a low-income community census tract?
  o a low-income household?

☐ **D. Low-income Household:** Is the project located within a low-income household?

Next Step: If the answer to one of the questions in Step 1 is "yes," continue to Step 2. If the answers are all "no," do not continue.
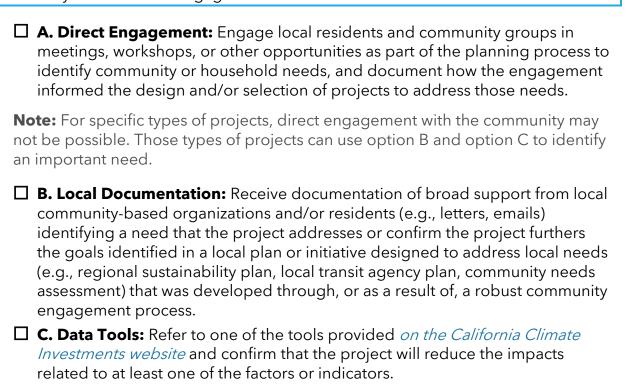
Step 2 – Identify a Need

Instructions: Review the options below and select one that explains how the community or household need for the priority population identified in Step 1 was determined.

> **Note:** California Climate Investments strongly encourages that program administrators and those that plan and implement projects work directly with local community residents and community-based organizations to identify and meaningfully address an important need.
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> **Resources:** Visit the *California Climate Investments Resource Portal* to explore promising practices, success stories, and other guides and resources about community outreach and engagement.

☐ **A. Direct Engagement:** Engage local residents and community groups in meetings, workshops, or other opportunities as part of the planning process to identify community or household needs, and document how the engagement informed the design and/or selection of projects to address those needs.

Note: For specific types of projects, direct engagement with the community may not be possible. Those types of projects can use option B and option C to identify an important need.

☐ **B. Local Documentation:** Receive documentation of broad support from local community-based organizations and/or residents (e.g., letters, emails) identifying a need that the project addresses or confirm the project furthers the goals identified in a local plan or initiative designed to address local needs (e.g., regional sustainability plan, local transit agency plan, community needs assessment) that was developed through, or as a result of, a robust community engagement process.

☐ **C. Data Tools:** Refer to one of the tools provided *on the California Climate Investments website* and confirm that the project will reduce the impacts related to at least one of the factors or indicators.

Note: Option D is for programs or projects serving individual households or businesses only, such as through vouchers or rebates distributed to qualifying applicants on either a first-come, first-served basis or on a needs-based model.

☐ **D. Direct Engagement During Program Development:** During program design, outreach, or updates, engage residents and community groups from priority populations to identify community or household needs and document how the engagement informed the design of the program to address those needs.

Instructions: Describe the community or household need and how it was identified. If option "B. Local Documentation" was chosen, briefly describe the documentation. If option "C. Data Tools" was chosen, include the name of the tool in the description.

Next Step: If an option in Step 2 is selected, continue to Step 3. If none are selected, do not continue.

Step 3 – Provide a Benefit

Instructions: Review the options below and select one that demonstrates how the project directly benefits the priority population identified in Step 1 and addresses the need identified in Step 2.

> **Note:** Projects must avoid potential substantial burdens or harms to priority populations.
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> **Resources:** Visit the *Climate Investments Resource Portal* to learn more about strategies for projects to avoid causing burdens and harms, including working with community members and community advocates to identify potential burdens or harms whenever possible.

☐ **A.** Project provides jobs that pay wages at or above the median wage in the project region, employer-sponsored healthcare coverage and retirement packages, and paid leave of at least 5 days per year or an accrual rate of one hour per 30 hours worked. These are the minimum requirements to satisfy this step, however, it is recommended that the project provides jobs that meet all of the *California Climate Investments job quality principles*.

☐ **B.** Project is subject to a Project Labor Agreement or Project Workforce Agreement, as defined in the *Funding Guidelines.*

☐ **C.** Project provides job training through a training program that partners with industry associations, employers, or provides in-house job placement services.

☐ **D.** Project provides job training that results in an industry-recognized, portable, stackable, or accredited credential. that allows a person to enter or advance in a specialized field.

Note: Only the portion of GGRF project funds associated with priority populations receiving high-quality jobs and training and related project administration is considered to benefit priority populations.

Next Step: If the project meets one option in each of the three steps above, then it is located within and considered to provide a direct, meaningful, and assured benefit to priority populations.